# Test Matrix User Manual

January 5, 2012
Revision 2

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# Overview of this training manual

This document serves as a supplement and guide to the recommended Test Matrix.  It provides a summary of functionality and features available.  It provides detailed information on how to use this recommended Test Matrix.

If there are any questions after reviewing this manual, please contact the IT – Application Quality Team using the Lotus Notes Group ‘IT Application Quality’.

# Overview of the Test Matrix

The test matrix is an excel document that is made up of 4 tabs:

1. Purpose-Scope
2. Test Grid
3. Results
4. Special Note


## Purpose - Scope

The ‘Purpose’ tab is a place for the user to enter any testing information that outlines the scope and procedures of the testing that will be completed using the test grid.  This helps everyone involved with the testing to understand what it is they are trying to accomplish and how they are expected to do it.

## Test Grid

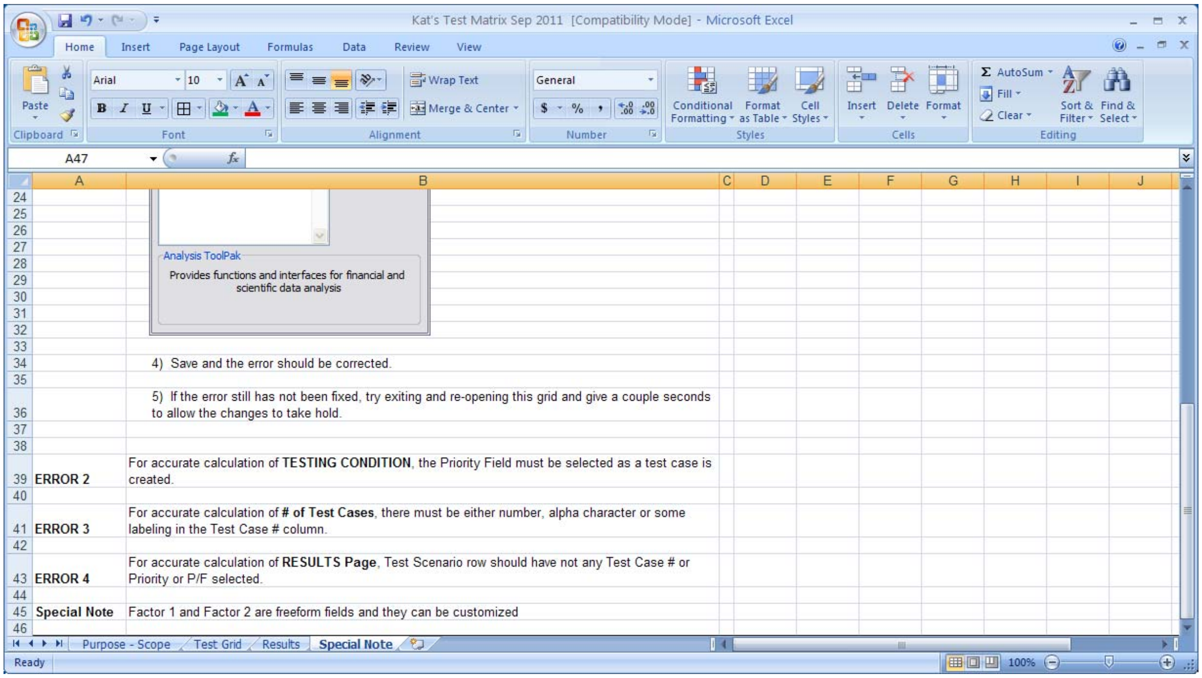
The ‘Test Grid’ tab contains the actual test matrix, including the details for the test scenarios and test cases.

## Results

This tab contains the summary information from the testing completed on the test matrix tab.  This summary information includes the overall testing condition (Green, Yellow, Red), the number of test cases completed, the percentage completed, the number of cases passed and the number failed as well as identifying progress on high priority test cases.

## Special Note

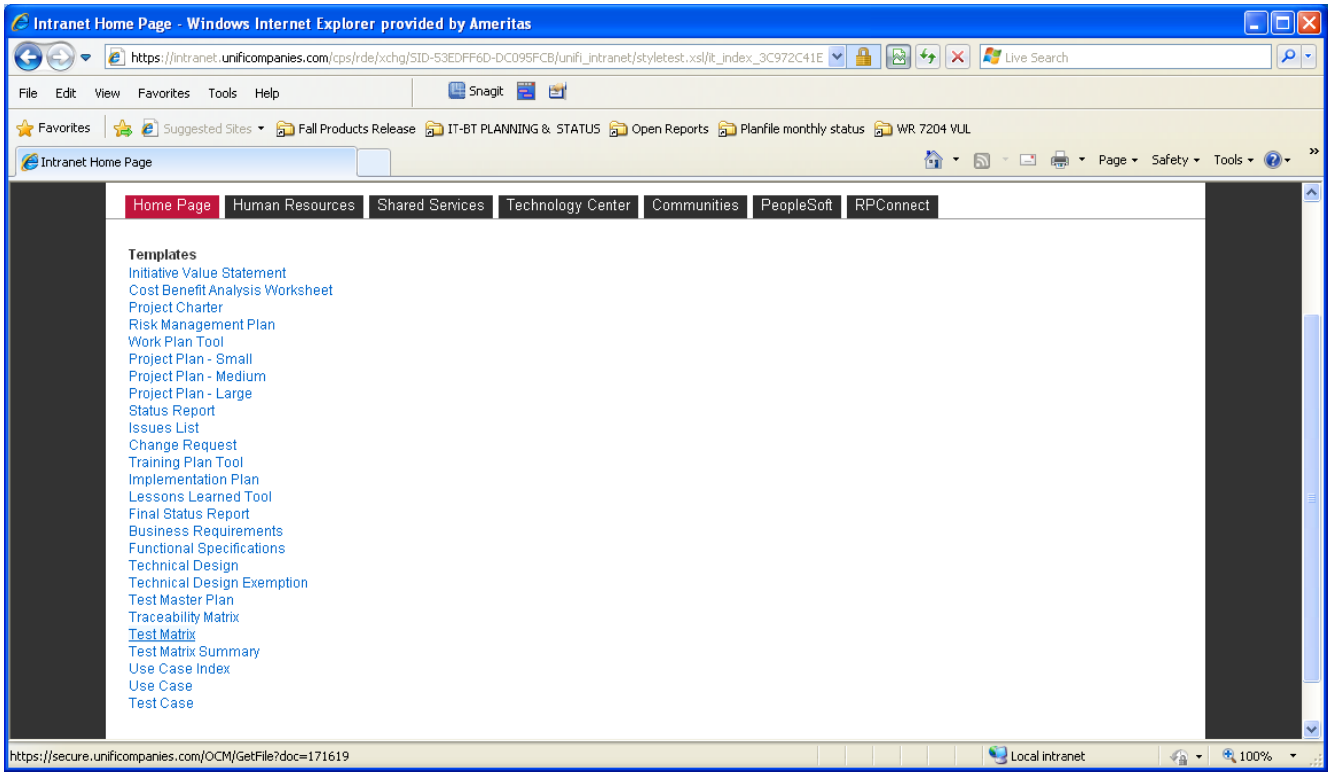
This provides information on what the user should be aware when using the Test Matrix to ensure that the calculation in the Result tab is correct.  This tab is not usually changed by the Testing Coordinator, but is used as a user guide and/or trouble shooting guide.  See sample below.


Kat's Test Matrix Sep 2011 [Compatibility Mode] - Microsoft Excel
Analysis ToolPak
Provides functions and interfaces for financial and scientific data analysis
4) Save and the error should be corrected.
5) If the error still has not been fixed, try exiting and re-opening this grid and give a couple seconds to allow the changes to take hold.
ERROR 2
For accurate calculation of TESTING CONDITION, the Priority Field must be selected as a test case is created.
ERROR 3
For accurate calculation of # of Test Cases, there must be either number, alpha character or some labeling in the Test Case # column.
ERROR 4
For accurate calculation of RESULTS Page, Test Scenario row should have not any Test Case # or Priority or P/F selected.
Special Note
Factor 1 and Factor 2 are freeform fields and they can be customized
Purpose - Scope
Test Grid
Results
Special Note

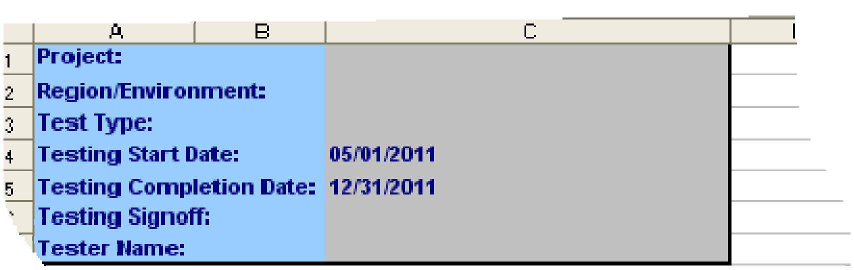
# How to use the Test Grid Tab

The recommended Test Matrix is located on the Ameritas Intranet – Technology Center page. Below is a path to this Test Matrix.

Under the Technology Center page – Project and Maintenance Methodology – Templates – Test Matrix




**1. Complete the title section of the test grid. Move the cursor to the field highlighted in gray to enter the information.**




Project = Name of the project and project number

Region/Environment = Name of the environment or region that this test matrix is being executed in.

Testing Type: Type of testing i.e. Unit, Integration, CAT, Performance, or Regression Testing

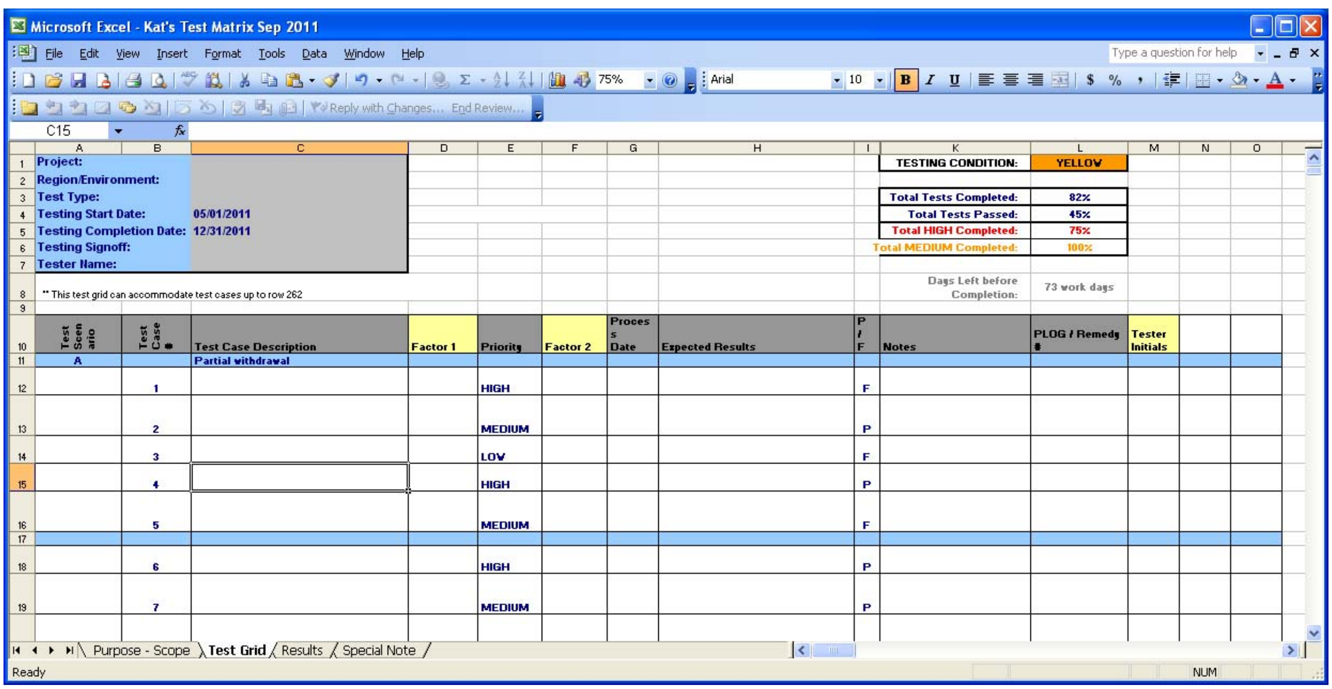
Testing Start Date: Date that the execution of this Test Matrix will start

Testing Completion Date: Date that this Test Matrix should be completed

Testing sign off: Date that the tester signed off on this Test Matrix

Tester Name: Name of the tester executing this Test Matrix

**2. Complete the Test Matrix - Planning**




2.1 In the test scenario column, number the Test Scenario(s) and provide a brief description of the Test Scenario in the Test Case Description column. The example shown above uses “A” as a label for Test Scenario. The description of the Test Scenario is “Partial Withdrawal”. The Test Scenario information row is highlighted for formatting reason so that it stands out from the Test Case information.

2.2 In the test case column, number the Test Case #(s) and provide the following information about each Test Case.

a. Test Case Description – exact detail of how this test case should be executed

b. Priority – select the priority from the drop down box.

High = testing not complete until executed and signed off; items critical to complete the project, implement the modification, or correct the problem; include items that are high frequency, high dollar impact, or immediate impact

Medium = testing not complete until executed and signed off; must still be completed before move to production; may not have immediate implementation impact

Low = may not be completed prior to moving to production due to time constraints; does not have large impacts or dollar expense; end user is willing to accept the risk

c. Expected Results – provide description on what you expect the “pass” result to be.

**3. Complete the Test Matrix - Execution**

When you are ready to execute the Test Matrix, the following fields should be completed.

3.1 Process Date: This is the date that the particular Test case was executed.

3.2 P/F: This is the result of the executed test case. Select either “P” or “F” from a drop down box.

3.3 Notes: This is an optional field that a tester can use for their own notes.

3.4 PLOG/Remedy #: This field is used to track any PLOG or remedy number associated with the Test Case.

3.5 Tester Initial: This is the field used to track each tester initial. This is used in the event that there are multiple testers using the same test matrix and each test case may be executed by a different tester.

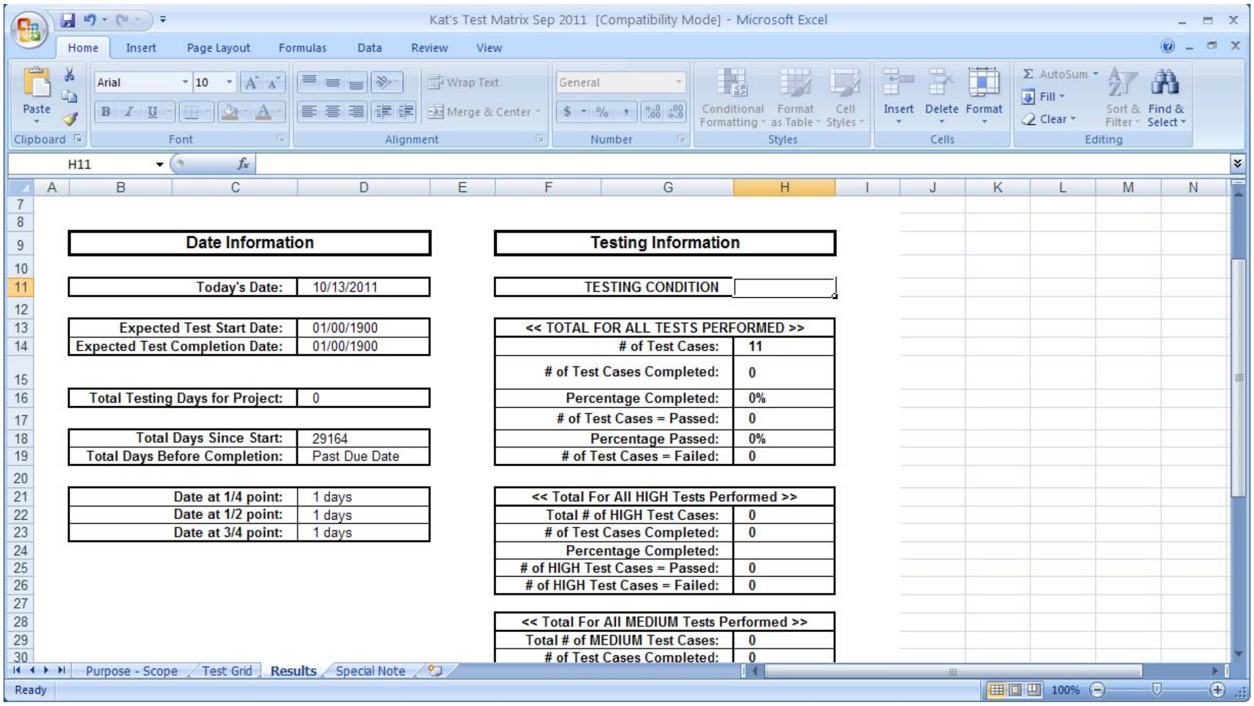
3.6 Factor 1 and Factor 2: These fields are free-form fields and can be customized to fit the needs of a specific Test Matrix.

3.7 Traceability: This column is used to track traceability between test scenario/test cases and requirement.

The test matrix can be further customized by adding additional Columns after Column N.

# Results Tab

1. Results Tab displays testing status information, which is automatically calculated.
2. Here is a picture of Results Tab




3. Note: A summary of the Results Tab information is also displayed in the upper right hand corner of the Test Grid tab for a quick reference

# Role of Testing Coordinator

Using the Testing Coordinator Test Matrix Summary, the Testing Coordinator can gather Results information from each individual tester and determine a testing status for the entire project.

1. Go to the Intranet Technology tab.  In the UNIFI IT Flow section, find the “Testing Coordinator Test Matrix Summary”.
2. Open and save this template to the project folder.

This template consists of the following tabs

   a. Data 1 through Data 7 – Contains copies of the results tab from each Individual test matrix for the project.
   b. Master Summary – Provides a summary page of Results for the entire project.


3. Copy the Results tab from each individual test matrix using the following procedure.
   a. Click on the Results tab of an individual Test Matrix

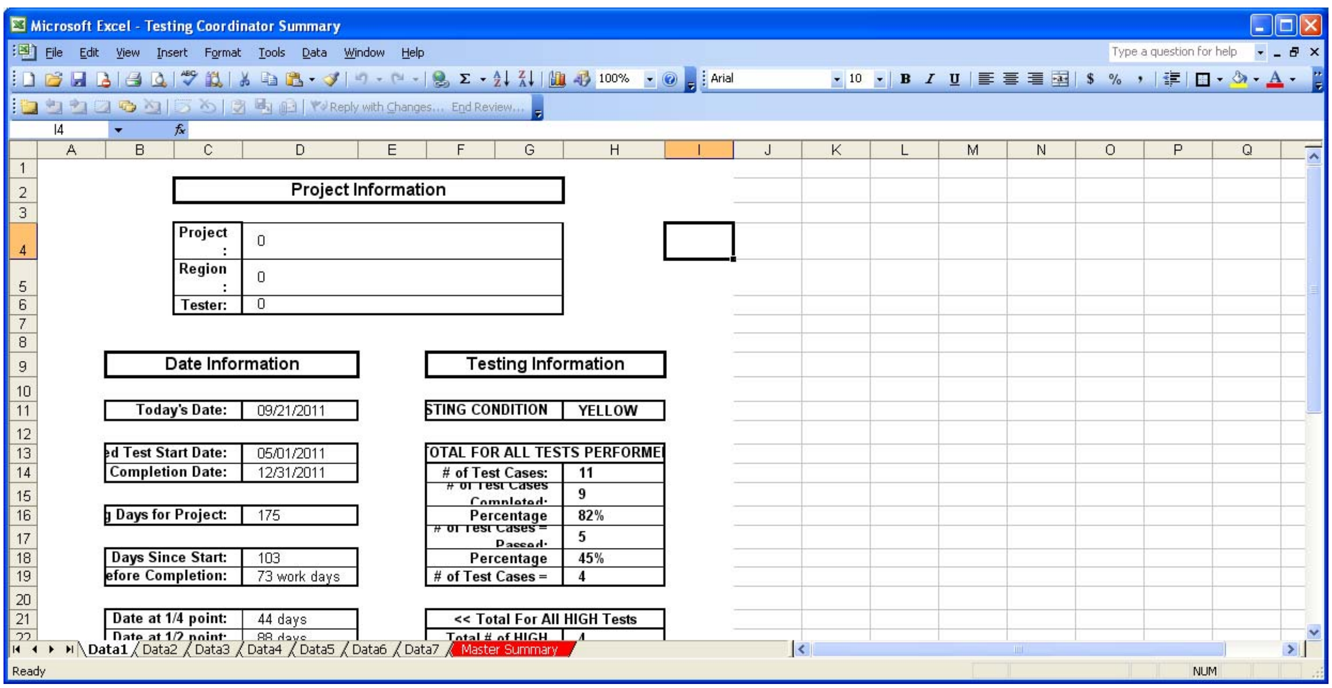
   b. Left click on the top-far left hand corner of the spreadsheet. The entire spreadsheet is now selected/highlighted
   c. Right click and select “copy”

4. Paste the Results tab to Testing Coordinator Test Matrix Summary
   a. Click Data1 tab
   b. Right click on the top-far left hand corner of the tab and select “Paste”.

   Continue copying and pasting each individual Test Matrix results tab using “Data2..3..and so on”.

The Testing Coordinator Test Matrix Summary is set up to accommodate a total of 7 different Test Matrix results, starting with the “Data1” tab. If additional tabs are needed for a project, please contact IT Application Quality Team for assistance.

The Master Summary tab provides a summary of various Test Matrix results which can be used to simplify status reporting. This summary information is automatically calculated for the project by the test matrix spreadsheet. See sample below.



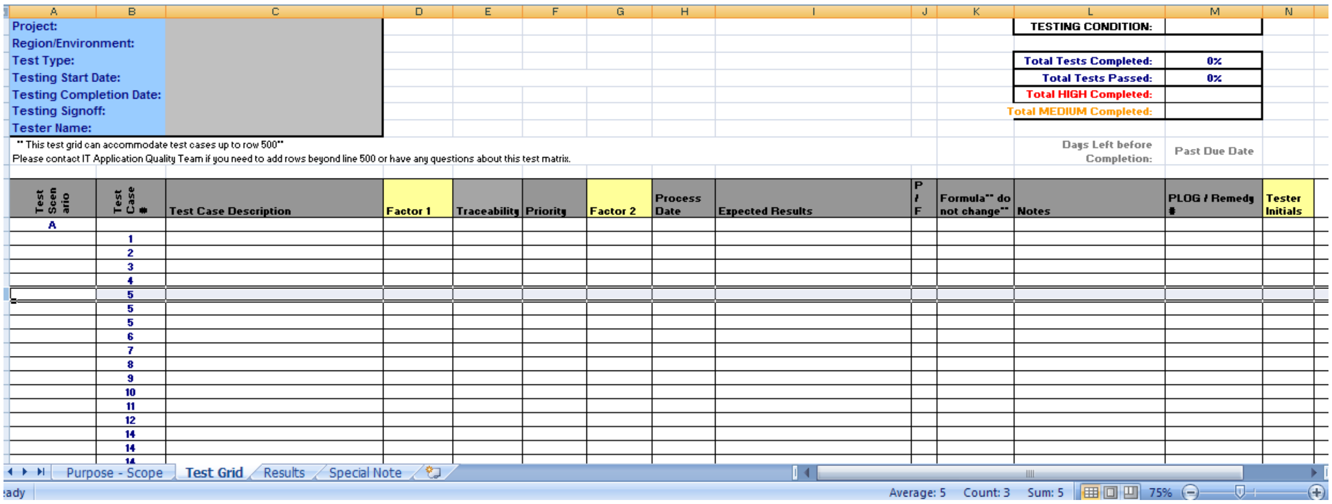

# Q&A

Q1: If the testing completion date of the project changes after the testing starts, should I update the Test Matrix – Testing Completion Date?

Ans1: Yes. The Testing Completion Date field on the Test Matrix should accurately represent the date that the testing of this project is scheduled to be completed.

Q2: Can this Test Matrix accommodate multiple testers?

Ans2: Yes. The Testers Initial column is used to track different testers executing various Test Scenario. A list of multiple tester names can be input in Tester Name field of the Test Matrix. The testing sign off field can have multiple sign off dates based on different testers. See an example below.



Q3: How can I insert rows in the Test Matrix?

Ans3: The Test Matrix is formulated to row 500. Column K has a formula that must be present in all rows in order for the RESULTS Page to calculate accurately. When inserting rows between row 11 and 500, please use the following procedure.

a. Highlight the entire row below the location where you want to insert the row.
b. Right click and select “Insert”. This will insert an empty row above your highlighted row.
c. Highlight the entire row above your newly inserted row(s).
d. Right click and select “Copy”.
e. Highlight the inserted row(s)
f. Right click and select “Paste”

By following this procedure, the newly inserted row(s) has the formula and validation required on the Test Grid page.

Q4: Can I delete any rows between row 11 and row 500? How?

Ans4: Yes. To delete any rows, please use the following procedure.

a. Highlight the entire row that you would like to delete.
b. Right click and select “Delete”.